

IN THE CLAIMS

1. (currently amended) A method for managing a deal process using a server system coupled to a database and in communication with a client system, the server associated with a business entity engaged in a business of offering at least one of products and services to prospective customers, said method comprising the steps of:

prompting a user associated with the business entity to create a business profile at the server system for storing within the database, the business profile includes permissions granted to each user associated with the business entity for accessing information stored within the database;

accessing the server system by a prospective customer by displaying on the client system at least one of a web page and a portal customized for attracting the prospective customer to a deal proposed by the business entity including purchasing at least one of a product and service offered by the business entity, the proposed deal is targeted by the business entity to the prospective customer and includes at least one of a loan, a lease, an equity stake, and a common equity;

prompting a user associated with the business entity to create a deal at the server system between the business entity and the prospective customer after the prospective customer has accessed the server system and selected a proposed deal;~~including identifying deal team members;~~ and

designating the prospective customer as a customer of the business entity;

assigning members to a deal team for the deal between the business entity and the customer, the deal team members include users associated with the business entity who will perform tasks for completing the deal;

assigning the customer to the deal team and enabling a user associated with the business entity to grant permissions to the customer for accessing specific information stored in the database;

assigning at the server system tasks and milestones to be performed by the deal team members for completing the deal;

notifying the deal team members of the deal team of the assigned tasks to be performed and milestones[[]]; and

tracking each task and milestone for completing the deal such that the deal team and the customer can monitor the progress of completing the deal.

2. (original) A method according to Claim 1 wherein said step of prompting a user to create a business profile further comprises the step of prompting a user to establish user accounts with authority levels of at least one of user, manager, and administrator.

3. (original) A method according to Claim 2 wherein said step of prompting a user to create a business profile further comprises the step of prompting an administrator to set up a structure of divisions and sub-divisions for the business.

4. (canceled)

5. (currently amended) A method according to ~~Claim 4~~ Claim 1 wherein said ~~personalized web pages~~ step of accessing the server system by a prospective customer further comprises accessing the server system by a prospective customer by displaying on the client system a personalized web page including further comprise at least one of an originator page, a prospect page, an intermediary page and a customer page.

6. (currently amended) A method according to ~~Claim 4~~ Claim 1 wherein said step of ~~prompting a user through~~ accessing the server system by a prospective customer further comprises accessing the server system by a prospective customer by displaying on the client

~~system a personalized portal that prompts a personal portal further comprises the step of prompting~~ a user to create at least one of a work group, a my profile and a user profile.

7. (original) A method according to Claim 1 wherein said step of prompting a user to create a deal further comprises the step of prompting a user to create at least one of a deal summary, a deal timeline, a deal menu, a deal workspace, a deal discussions area, a deal library and a deal profile.

8. (original) A method according to Claim 7 further comprising the step of creating a briefing page, including channels for both company users and non-company users.

9. (original) A method according to Claim 1 wherein said step of prompting a user to create a deal further comprises the step of building a library for the deal.

10. (currently amended) A method according to Claim 1 wherein said step of notifying the deal team members ~~of a deal team~~ further comprises the step of providing a deal status to deal team members.

11. (currently amended) A method according to Claim 1 wherein said step of notifying the deal team members ~~of a deal team~~ further comprises the step of prompting a user for feedback.

12. (currently amended) A method according to Claim 1 wherein said step of notifying the deal team members ~~of a deal team~~ further comprises the step of providing capability for at least one of a search of profiles of deal team members, a search across all businesses and a deal search, search results in a format specified by the user.

13. (currently amended) A method according to Claim 1 wherein said step of notifying the deal team members ~~of a deal team~~ further comprises the step of prompting a user to create or modify at least one of task templates for the deal and library templates for the deal.

14. (original) A method according to Claim 1 wherein said step of prompting a user to create a deal further comprises the step of prompting a user to create a customer company profile.

15. (currently amended) A method according to ~~Claim 14~~ Claim 1 further comprising wherein said step of prompting a user associated with the business entity to create or modify library templates further comprises the step of prompting a user to create or modify an index card functionality used to track information on regarding files uploaded and downloaded from the a library of files stored within the database and assigned to the deal.

16. (currently amended) A system comprising:

at least one computer configured as a server associated with a business entity engaged in a business of offering at least one of products and services to prospective customers, said server ~~containing~~ coupled to a database of for storing business rules profiles, libraries and templates ~~for deals for at least one business entity; and~~

at least one client system connected to said server through a network, said server configured to:

prompt a user associated with the business entity to create a business profile, the business profile includes permissions granted to each user associated with the business entity for accessing information stored within the database;

display on the at least one client system for a prospective customer at least one of a web page and a portal customized for attracting the prospective customer to a deal proposed by the business entity including purchasing at least one of a product and service offered by the business entity, the proposed deal is targeted by the business entity to the prospective customer and includes at least one of a loan, a lease, an equity stake, and a common equity;

prompt a user associated with the business entity to create a deal between the business entity and the prospective customer after the prospective customer has selected a proposed deal;~~including identifying deal team members; and~~

designate the prospective customer as a customer of the business entity;

assign members to a deal team for the deal between the business entity and the customer, the deal team members include users associated with the business entity who will perform tasks for completing the deal;

assign the customer to the deal team and enable a user associated with the business entity to grant permissions to the customer for accessing specific information stored in the database;

prompt a user to assign tasks and milestones to be performed by the deal team members for completing the deal, the tasks and milestones are entered using templates stored within the database;

notify the deal team members of the deal team of the assigned tasks to perform be performed and milestones accomplished[[]]; and

track each task and milestone for completing the deal such that the deal team and the customer can monitor the progress of completing the deal.

17. (original) A system according to Claim 16 wherein said server is configured with user accounts with authority levels of at least one of user, manager, and administrator.

18. (original) A system according to Claim 16 wherein said server is configured with a business structure of divisions and sub-divisions for the business.

19. (canceled)

20. (currently amended) A system according to ~~Claim 19~~ Claim 16 wherein said server is configured to provide a prospective customer access by displaying on the at least one client

~~system with~~ personalized web pages ~~of including~~ at least one of a deal originator page, a prospect page, an intermediary page and a customer page.

21. (currently amended) A system according to ~~Claim 19~~ Claim 16 wherein said ~~personal~~ portal comprises an interface to at least one of a work group, a my profile and a user profile.

22. (original) A system according to Claim 16 wherein said server is configured with at least one of a deal summary, a deal timeline, a deal menu, a deal workspace, a deal discussions area, a deal library and a deal profile.

23. (currently amended) A system according to Claim 16 wherein said server is configured with a briefing page, including channels for both ~~company~~ business entity users and ~~non-company non-business entity~~ users.

24. (original) A system according to Claim 16 wherein said server is configured to assign tasks for members of the deal team.

25. (original) A system according to Claim 16 wherein said server is configured to provide deal team members with a deal status.

26. (original) A system according to Claim 16 wherein said server is configured to prompt a user for feedback.

27. (original) A system according to Claim 16 wherein said server is configured with a search capability for at least one of searching profiles of deal team members, searching across all businesses within a multiple business company, and deal searching.

28. (original) A system according to Claim 27 wherein said server is configured to provide search results in a format specified by a user.

29. (original) A system according to Claim 16 wherein said server is configured for at least one of prompting a user to create and modify task templates including milestones and tasks for the deal and prompting a user to create and modify library templates for the deal.

30. (currently amended) A system according to Claim 16 wherein said server comprises an index card functionality for tracking information ~~on~~ associated with files uploaded and downloaded from a library of files stored within the database and assigned to the deal.

31. (currently amended) Apparatus comprising:

means for a user associated with a business entity to create business profiles, the business entity engaged in a business of offering at least one of products and services to prospective customers, the business profile includes permissions granted to each user associated with the business entity for accessing information stored within a database;

means for storing records of identified ~~business prospects~~ prospective customers within the database;

means for providing access to the database for a prospective customer by displaying at least one of a web page and a portal customized for attracting the prospective customer to a deal proposed by the business entity including purchasing at least one of a product and service offered by the business entity, the proposed deal is targeted by the business entity to the prospective customer and includes at least one of a loan, a lease, an equity stake, and a common equity;

means for prompting a user associated with the business entity to create a deal between the business entity and the prospective customer after the prospective customer has selected a proposed deal;

~~means for creating user interfaces for business prospects;~~

~~means for storing a status for the business prospects; and~~

means for designating the prospective customer as a customer of the business entity;

means for assigning members to a deal team for the deal between the business entity and the customer, the deal team members include users associated with the business entity who will perform tasks for completing the deal;

means for assigning the customer to the deal team and enabling a user associated with the business entity to grant permissions to the customer for accessing specific information stored in the database;

means for assigning tasks and milestones to be performed by the deal team members for completing the deal;

means for notifying the deal team members of the assigned tasks to be performed and milestones; and

means for tracking each task and milestone for completing the deal such that the deal team and the customer can monitor the progress of completing the deal ~~means to facilitate deal processing and tracking by members of a deal team.~~

32. (original) Apparatus according to Claim 31 wherein said means for a user to create business profiles comprises means to set up and maintain user accounts with authority levels of at least one of user, manager, and administrator.

33. (original) Apparatus according to Claim 31 wherein said means for a user to create business profiles comprises means to maintain a structure for the business, including creation and modification of divisions and sub-divisions for the business.

34. (currently amended) Apparatus according to Claim 31 further comprising means for creating at least one of user accounts for the prospective customers through a personal portal or personalized web pages.

35. (original) Apparatus according to Claim 31 further comprising means for creating and storing at least one of a deal originator page, a prospect page and a customer page.

36. (original) Apparatus according to Claim 31 further comprising means for creating and storing at least one of a work group, a my profile, a user profile and a customer company profile.

37. (original) Apparatus according to Claim 31 further comprising means for creating and storing a deal, including least one of a deal summary, a deal workgroup, a deal timeline, a deal menu, a deal workspace, a deal discussions area, a deal library, a deal profile, a deal status and a briefing page.

38. (original) Apparatus according to Claim 37 further comprising means for creating and storing milestones and tasks for members of a deal team.

39. (original) Apparatus according to Claim 37 further comprising means for creating and storing user feedback.

40. (original) Apparatus according to Claim 37 further comprising means for searching profiles of deal team members and searching across all businesses within a multiple business company.

41. (original) Apparatus according to Claim 37 further comprising means for searching within the deal and providing search results in a format specified by the user.

42. (currently amended) Apparatus according to Claim 37 further comprising means for at least one of creating and modifying and task templates for a deal, creating and modifying library templates for a deal and creating and modifying an index card functionality for tracking information on associated with files uploaded and downloaded from a library of files stored within the database and assigned to the deal.

43.-47. (canceled)

48. (currently amended) A method for initiating a deal transaction using a server system coupled to a database and in communication with a client system, the client system having a user

interface, the server associated with a business entity engaged in a business of offering at least one of products and services to prospective customers, said method comprising the steps of:

prompting a user associated with the business entity to create a business profile at the server system for storing within the database, the business profile includes permissions granted to each user associated with the business entity for accessing information stored within the database;

accessing the server system by a prospective customer by displaying on the a user interface of the client system at least one of a web page and a portal customized for attracting the prospective customer to a deal proposed by the business entity including purchasing at least one of a product and service offered by the business entity, the proposed deal is targeted by the business entity to the prospective customer and includes at least one of a loan, a lease, an equity stake, and a common equity;

~~selecting, from the user interface, the initiation of a deal; and~~

prompting a user associated with the business entity to create a deal at the server system between the business entity and the prospective customer after the prospective customer has accessed the server system and selected a proposed deal;

designating the prospective customer as a customer of the business entity;

~~selecting, from the user interface, members of a deal team.~~

assigning members to a deal team for the deal between the business entity and the customer, the deal team members include users associated with the business entity who will perform tasks for completing the deal;

displaying a library template downloaded from the server system for prompting a user associated with the business entity to organize documents associated with the deal within a deal library stored in the database;

assigning the customer to the deal team and enabling a user associated with the business entity to grant permissions to the customer for accessing specific information stored in the database including specific documents stored within the deal library;

assigning at the server system tasks and milestones to be performed by the deal team members for completing the deal;

notifying the deal team members of the assigned tasks to be performed and milestones;
and

tracking each task and milestone for completing the deal such that the deal team and the customer can monitor the progress of completing the deal.

49. (original) A method according to Claim 48 wherein said user interface comprises at least one of a personalized user portal and a prospecting web page.

50. (canceled)

51. (currently amended) A method according to ~~Claim 50~~ Claim 48 wherein said step of ~~causing a deal to be created~~ prompting a user associated with the business entity to create a deal at the server system further comprises the step of enabling a user associated with the business entity to define selecting at least one of a library template and a task template, including milestones and tasks, ~~for the deal~~ for use in a plurality of deals to provide a consistent approach to all deals associated with the business entity.

52. (currently amended) A method according to ~~Claim 50~~ Claim 48 wherein said step of ~~causing a deal to be created~~ prompting a user associated with the business entity to create a deal further comprises the step of causing a deal discussion area to be created.

53. (original) A method according to Claim 49 wherein said prospecting web page comprises one of an originator page, a prospect page, an intermediary page and a customer page.

54. (currently amended) A method according to Claim 48 wherein said step of ~~selecting, members of a deal team~~ assigning members to a deal team further comprises the step of causing a user profile pop-up window to be displayed.

55.-60. (canceled)

61. (currently amended) A computer program embodied on a computer-readable medium for managing a deal process between a business entity and a prospective customer, the business entity engaged in a business of offering at least one of products and services to prospective customers, said program comprising at least one code segment that receives information and then:

prompts a user associated with the business entity to create a business profile for storing within a database, the business profile includes permissions granted to each user associated with the business entity for accessing information stored within the database;

~~a record of user interfaces;~~

displays for a prospective customer at least one of a web page and a portal customized for attracting the prospective customer to a deal proposed by the business entity including purchasing at least one of a product and service offered by the business entity, the proposed deal is targeted by the business entity to the prospective customer and includes at least one of a loan, a lease, an equity stake, and a common equity;

~~a record of user initiated deals; and~~

prompts a user associated with the business entity to create a deal between the business entity and the prospective customer after the prospective customer has selected a proposed deal;

designates the prospective customer as a customer of the business entity;

~~a record of deal team members for each deal.~~

assigns members to a deal team for the deal between the business entity and the customer, the deal team members include users associated with the business entity who will perform tasks for completing the deal;

assigns the customer to the deal team and enables a user associated with the business entity to grant permissions to the customer for accessing specific information stored in the database;

assigns tasks and milestones to be performed by the deal team members for completing the deal;

notifies the deal team members of the assigned tasks to be performed and milestones; and

tracks each task and milestone for completing the deal such that the deal team and the customer can monitor the progress of completing the deal.

62. (currently amended) A ~~computer-readable medium~~ computer program according to Claim 61 further comprising a code segment that displays for a prospective customer at least one of a web page and a portal customized for attracting the prospective customer wherein said record of user interfaces the web page comprises a record of one of a personalized user portal or a prospecting web page customized for the prospective customer and the portal comprises a portal customized for the prospective customer.

63. (currently amended) A ~~computer-readable medium~~ computer program according to Claim 61 further comprising a code segment that prompts a user to select wherein said record of user initiated deals comprises a selection of at least one of a library template and a task template, including milestones and tasks, for the deal.

64. (currently amended) A ~~computer-readable medium~~ computer program according to Claim 61 further comprising a code segment that provides wherein said record of user initiated deals comprises a record for a deal discussion area for the deal.

65. (currently amended) A ~~computer-readable medium~~ computer program according to Claim 62 further comprising a code segment that displays for a prospective customer at least one of a web page and a portal customized for attracting the prospective customer wherein said record of a prospecting the web page comprises a record of at least one of an originator page, a prospect page, an intermediary page and a customer page.

66. (currently amended) A ~~computer-readable medium~~ computer program according to Claim 61 further comprising a code segment that prompts a user associated with the business entity to enter wherein record of deal team members further comprises a record of user profiles for each deal team member.

67. (currently amended) A computer for managing a deal process between a business entity and a prospective customer, the computer coupled to a database, the business entity engaged in a business of offering at least one of products and services to prospective customers, the computer programmed to: ~~prompt a user with a deal prospect web page.~~

prompt a user associated with the business entity to create a business profile for storing within the database, the business profile includes permissions granted to each user associated with the business entity for accessing information stored within the database;

display for a prospective customer at least one of a web page and a portal customized for attracting the prospective customer to a deal proposed by the business entity including purchasing at least one of a product and service offered by the business entity, the proposed deal is targeted by the business entity to the prospective customer and includes at least one of a loan, a lease, an equity stake, and a common equity;

prompt a user associated with the business entity to create a deal between the business entity and the prospective customer after the prospective customer has selected a proposed deal;

designate the prospective customer as a customer of the business entity;

assign members to a deal team for the deal between the business entity and the customer, the deal team members include users associated with the business entity who will perform tasks for completing the deal;

assign the customer to the deal team and enable a user associated with the business entity to grant permissions to the customer for accessing specific information stored in the database;

assign tasks and milestones to be performed by the deal team members for completing the deal;

notify the deal team members of the assigned tasks to be performed and milestones; and

track each task and milestone for completing the deal such that the deal team and the customer can monitor the progress of completing the deal.

68. (currently amended) A computer according to Claim 67 further programmed to display wherein to prompt a user with a prospect web page, said computer displays a computer generated screen of at least one of an originator page, a prospect page, a customer page and an intermediary page.

69. (currently amended) A computer according to Claim 67 further programmed to display wherein to prompt a user with a prospect web page, said computer displays a computer generated screen including a selectable link to at least one of a message center, a company tools and tours screen, a case studies screen, a spotlight feature screen and a resources screen.

70. (original) A computer according to Claim 67 programmed to generate a home page activity report page indicating which users at which companies are accessing the prospect web pages, how often the page is accessed, and which tools are being accessed.

71.-74. (canceled)

75. (new) A method according to Claim 1 wherein said step of assigning the customer to the deal team further comprises:

storing documents associated with the deal in a library within the database specifically assigned to the deal; and

enabling a user associated with the business entity to grant permissions to the customer for accessing specific documents stored within the deal library such that the customer can monitor the progress of the deal.

76. (new) A system according to Claim 16 wherein the server is further configured to:

store documents associated with the deal in a library within the database specifically assigned to the deal; and

enable a user associated with the business entity to grant permissions to the customer for accessing specific documents stored within the deal library such that the customer can view documents generated as part of the deal.

77. (new) Apparatus according to Claim 31 wherein said means for assigning the customer to the deal team further comprises:

means for storing documents associated with the deal in a library within the database specifically assigned to the deal; and

means for enabling a user associated with the business entity to grant permissions to the customer for accessing specific documents stored within the deal library such that the customer can monitor the progress of the deal.

78. (new) A computer program according to Claim 61 further comprising a code segment that:

stores documents associated with the deal in a library within the database specifically assigned to the deal; and

enables a user associated with the business entity to grant permissions to the customer for accessing specific documents stored within the deal library such that the customer can view documents generated as part of the deal.